

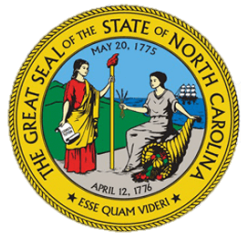
North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

Vaccine Administration User Guide

Version 7

March 10, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the COVID-19 Provider Help Center at (877) 873-6247 and select option 8. The COVID-19 Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

*For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register:
VAC2021*

3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview

NCDHHS CVMS Provider Portal

Home Recipient Appointments Slot Management Help & Information

You are currently logged in as Clinic Location1

[Switch Locations](#)

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

No Appointment Confirmation Number

[Search Appointments](#)

Appointment Waiver

You can search for eligible individuals by entering their name and address. Search on exact matches only, no partial matches.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
11:00 AM	Test Tall Recipient-1	00015310	Clinic Location1

Select a date & time

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

1 Appointment 1
Choose a date and time

March 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

7 appointments available
For Thursday March 11, 2021

1:00pm	2:00pm	3:00pm
4:00pm	5:00pm	6:00pm
7:00pm		

[Continue](#)

[< Back](#)

Administering the COVID-19 vaccine typically involves:

1. Confirming Recipient consent to receive the COVID-19 vaccine
2. Recording the Vaccine Administration details
3. Understanding post-Vaccine Administration reminders

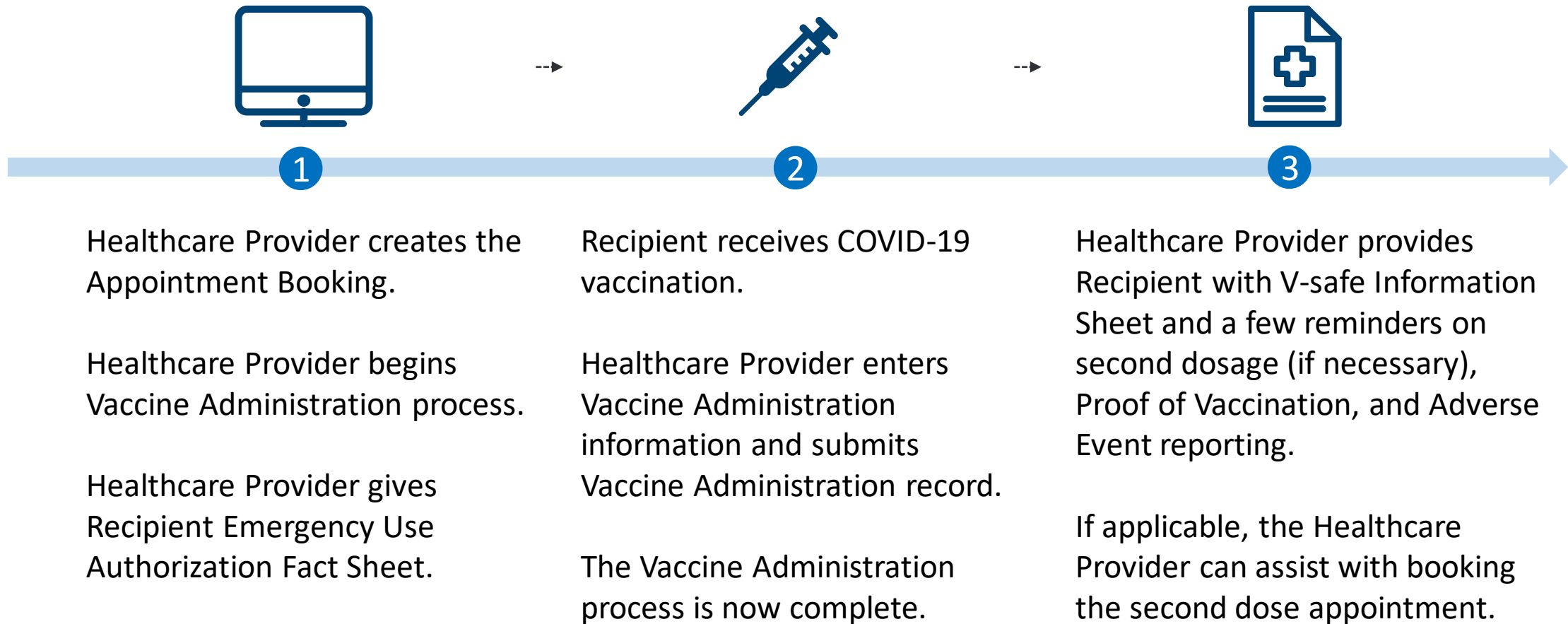
The processes included in this training are for the **Healthcare Provider and Healthcare Location Manager** profiles.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers (Internet Explorer or Edge non-Chromium browsers are not supported)
- Log into the CVMS Provider portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

Vaccine Administration Process



Key Terms

EUA Fact Sheet

Under section 564 of the Federal Food, Drug, and Cosmetic Act, the FDA Commissioner may allow unapproved medical products or unapproved uses of approved medical products to be used in an emergency to diagnose, treat, or prevent serious or life-threatening diseases or conditions caused by CBRN threat agents when there are no adequate, approved, and available alternatives. This is known as Emergency Use Authorization.


Confirm Location of Operations

(only for Users associated to multiple locations)

Step 1 of 4: Verify Location for Operations

Before you begin logging **VACCINE ADMINISTRATION** details, you will need to verify which location you are operating in.

The current location you are operating in is displayed at the top left of the screen. If the location is correct, no further action is required.



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Crimson Skies - Location 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager


Tips

To learn more about getting access to other locations, speak to your location's **LOCATION MANAGER** in charge of setting up user accounts.

Step 2 of 4: Begin Switching Locations

If the location needs to be changed (e.g., you are operating in a different clinic location than the one currently displayed), continue following the instructions in this section.

- 1. Select the **SWITCH LOCATIONS** button
- 2. A pop-up window will appear asking you to select the location you would like to be operating in



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Crimson Skies

Switch Locations

Recipient Check-In

You can check in a recipient by entering

Appointment Confirmation Number

No Appointment Confirmation Number

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Select the location to proceed:

Location Name	Street	City	State	Country	Postal Code
<input type="radio"/> Crimson Skies - Location 1	123 Test Dr null	Raleigh	North Carolina	USA	27609
<input type="radio"/> Crimson Skies - Location 3				USA	
<input type="radio"/> Crimson Skies - Location 2	null null			USA	

LOCATION

Clinic Location1

Submit

Close

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 3 of 4: Submit New Location To Operate In

- 1. Select the location that you would like to operate in
- 2. Verify that the address matches the desired location
- 3. Click **SUBMIT**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

To see a list of locations you have access to operate in / can search for, speak to your location’s **LOCATION MANAGER** or your location’s **VACCINE COORDINATOR**.

Select the location to proceed:


Location Na... ▾	Street ▾	City ▾	State ▾	Country ▾	Postal Code ▾
<input type="radio"/> Crimson Skies - Location 1	123 Test Dr null	Raleigh	North Carolina	USA	27609
<input checked="" type="radio"/> Crimson Skies - Location 3				USA	
<input type="radio"/> Crimson Skies - Location 2	null null			USA	

Submit

Close

Step 4 of 4: Confirm Successful Location Switch

Verify that the location successfully switched by checking the display at the top left of the Home Tab.



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Crimson Skies - Location 3

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Enter Vaccine Administration Record

Step 1 of 10: Begin Vaccine Administration

There are three methods to begin the **VACCINE ADMINISTRATION** process.

When a **RECIPIENT** walks in to receive their COVID-19 vaccine and they do not have a scheduled appointment, the Healthcare Provider who initially verifies their Vaccine Group and identity will create an Appointment Booking for the Recipient.

The Healthcare Provider who will administer the COVID-19 vaccine will select the Recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.

Audience


Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

To review how to check-in a recipient through the Appointment Walk-In tool, review the **CVMS PROVIDER PORTAL RECIPIENT POINT OF CARE** User Guide.



CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Step 2 of 10: Begin Vaccine Administration

Alternatively, if you are a provider that has signed up for the CVMS Scheduling Feature, you can begin the **VACCINE ADMINISTRATION PROCESS** by entering the Recipient’s **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

- 1. Enter the **APPOINTMENT CONFIRMATION NUMBER** for the Recipient
- 2. Click **GO**

Audience


Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

For information on how sign up for the CVMS Scheduling Feature, please refer to the **Managing Vaccine Site Locator and Appointment Scheduling** User Guide at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers>.



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

You are currently logged in as Clinic ABC Loc 1

[Switch Locations](#)

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

[Search Appointments](#)

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Step 3 of 10: Begin Vaccine Administration

Lastly, for those providers with access to the CVMS Scheduling Feature, the **VACCINE ADMINISTRATION** process can also begin from the **APPOINTMENTS TAB**.

- 1. Navigate to the **APPOINTMENTS TAB**
- 2. Find the **CORRECT APPOINTMENT BOOKING** for the Recipient you'd like to begin the Vaccine Administration for
- 3. Click the drop-down arrow to the right of their name
- 4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**

Audience


Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

For information on how sign up for the CVMS Scheduling Feature, please refer to the **CVMS Provider Portal Editing Location on Vaccine Finger and Managing Appoints User Guide**.



Home

Recipient

Appointments

Help & Information

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

20 items

Cancel Appointment

Search Appointments

Search Confirmation Number

From

To

Status

Search by Name, Location, Vaccine Status

2021-03-09

New

Search

Reset

<input type="checkbox"/>	Case	Confirmation...	Date	Time	Recipient Na...	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General H...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	N W W	1980-01-01	County General H...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Fl...	1991-03-10	County General H...	Dose 1 Scheduled	New

Step 4 of 10: Receive Verbal Consent

Beginning the **VACCINE ADMINISTRATION** process takes you to the **PATIENT VERIFICATION & SCREENING** page.

1. Review the Recipient's health information on the right-hand side of the screen and click **NEXT**
2. On the **VACCINE CONSENT AND MEDICAL HISTORY** page, read the **DISCLOSURE STATEMENT** to the Recipient
3. After you **RECEIVE VERBAL CONSENT**, you can **CHECK** the check box indicating that consent was provided and click **NEXT**

*Note: The Recipient's **MEDICAL HISTORY** will be displayed on the right-hand side of the screen throughout the entire Vaccine Administration Process.*

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

<

Step 5 of 10: Provide the EUA Fact Sheet

Before you administer the COVID-19 vaccine, you must also **PROVIDE** the **EMERGENCY USE AUTHORIZATION (EUA) FACT SHEET** and the **V-SAFE INFORMATION SHEET** to the Recipient or guardian.

1. Obtain copies of the EUA Fact Sheet at this website (There will be different EUAs for different vaccines): <https://www.fda.gov/media/144414/download> (Pfizer EUA)
2. Obtain copies of the V-safe Information Sheet at this website: https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf
3. Provide the Recipient or guardian with the EUA Fact Sheet prior to vaccination.
4. Ask the Recipient if they have any questions about the risks and benefits of receiving the COVID-19 vaccine.
5. Counsel the Recipient on the importance of enrolling in V-safe to report any adverse events following vaccination.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Step 6 of 10: Review the Vaccine Administration Details

Once you receive the Recipient's consent and provide them with the appropriate EUA Fact Sheet, you will continue to the **VACCINE ADMINISTRATION** page. This page is where you will **CAPTURE KEY INFORMATION** about the **COVID-19 VACCINE ADMINISTERED**.

NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Vaccine Administration

Vaccination Details

* Injection Site

Left Deltoid

* Dose

First Dose

Second Dose

* Route

Intramuscular (IM)

Subcutaneous (SQ)

Intradermal (ID)

* Date and Time of Vaccination

Date

Jan 13, 2021

Time

2:18 PM

On Behalf of (Clinician)

-- Select Vaccine Administrator --

123

Enter vial

Clear

Medical History

VaccineAdmin Test

DOB: Dec 12, 1933

Age: 87

Gender

Male

* Vaccine Product

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

* Manufacturer

Pfizer-BioNtech

* Available Vaccine Inventory

Expiration 1/13/2021 8:30 (Exp. Date: 1/13/2021) (Lot No: 100)

Lot Number

100

Serial Number

100

NDC

59267-1000-02

Expiration Date

Jan 13, 2021

Notes

No notes to report.

Previous

Email Address

Phone Number

Preferred Communication Channel

None

Next

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

Step 7 of 10: Vaccine Administration Details for the Second Vaccine Dose

Vaccine Administration

Dose 1 Details	
Date and Time 12/17/2020, 02:58 PM EST	Medical Callen R DOB: De Age: 25
Administered By RegressionTest HCP	Gender Male
On Behalf of (Clinician) RegressionTest HCP	Race Asian
Location RegressionTest Loc 12	Ethnicity Not Hisp
Vaccine Inventory RegTest3 Delivery 12/16/2020	Health C None
Vaccine Product Pfizer-BioNTech (25 MDV) COVID-19 Vaccine	Covid-19 No
Lot Number Lot999999	Critical / Yes

If your Recipient has already **RECEIVED A FIRST DOSE** of the COVID-19 vaccine, you will see **FIRST DOSE DETAILS** at the top of the **VACCINE ADMINISTRATION PAGE**.

Dose 1 Details will include:

- Date and Time
- Administered By
- On Behalf Of (Clinician)
- Location
- Vaccine Inventory
- Vaccine Product
- Lot Number

Alternately, if a Recipient received a first dose outside of CVMS (e.g., out of state, through a Long-Term Care facility), the **FIRST DOSE DETAILS** will not appear. You may still mark the dose as a **SECOND DOSE**. In that instance, a warning label will appear at the top of the screen prompting you to verify that the Recipient has received a first dose.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

Verify if a prior dose was given to the Recipient.

Selecting **SECOND DOSE** will put the Recipient into **DOSE 2 ADMINISTERED** status.




Warning

Please verify the recipient has received their first dose before choosing Second Dose.



Step 8 of 10: Enter Vaccine Administration Details



Home

Recipient

Appointments

Help & Information

Vaccine Admin

Vaccination Details

* Injection Site

Left Deltoid

* Dose

First Dose

Second Dose

* Route

Intramuscular (IM)

Subcutaneous (SQ)

Intradermal (ID)

* Date and Time of Vaccination

Date

Jan 13, 2021

Time

2:18 PM

On Behalf of (Clinician)

-- Select Vaccine Administrator --

123

Enter vial

Clear

On the **VACCINE ADMINISTRATION** page, you will capture all **VACCINE DETAILS**.

1. Populate all **REQUIRED** vaccination details

- Injection Site
- Dose
- Route
- Date & Time of Vaccination (This field will default to the current date and time, but can be edited to record a vaccine administered in the past)

Note: The field **ON BEHALF OF (CLINICIAN)** allows you to enter information on behalf of another clinician who administered the COVID-19 vaccine.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Use the drop-down for the **ON BEHALF OF (CLINICIAN)** field and type the first letter of the clinician’s name.

If the individual completing the form is the person who administered the vaccine, **DO NOT ENTER** anything in the **ON BEHALF OF (CLINICIAN)** field.

Step 9 of 10: Enter Vaccine Administration Details

* Vaccine Product

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

* Manufacturer

Pfizer-BioNtech

* Available Vaccine Inventory

Expiration 1/13/2021 8:30 (Exp. Date: 1/13/2021) (Lot No: 100)

Lot Number

100

Serial Number

100

NDC

59267-1000-02

Expiration Date

Jan 13, 2021

Notes

No notes to report.

Previous

1. Continue populating all **REQUIRED** vaccination details
 - Vaccine Product (Vaccine Type)
 - Available Vaccine Inventory (what lot?)

Note: If you select a **SINGLE-DOSE** vaccine product, you must select **FIRST DOSE**, otherwise you will receive an error.

2. Enter any additional notes that are relevant in the **NOTES** text field
3. **REVIEW ALL VACCINE DETAILS**
4. Click **NEXT**

*If you are administering a second COVID-19 vaccine dose, please be sure to confirm the COVID-19 vaccine is from the **SAME MANUFACTURER** as the first COVID-19 vaccine dose.*

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

MANUFACTURER, LOT NUMBER, SERIAL NUMBER, NDC NUMBER and EXPIRATION DATE will AUTO POPULATE once you select the Product and Available Vaccine Inventory.

Step 10 of 10: Finish an Appointment

If you have administered a **SINGLE-DOSE** product of this is a second dose appointment, you will be routed back to the **HOME PAGE**.

If you have administered the first dose of a **TWO-DOSE** product, you will be routed to the **SCHEDULE FOLLOW-UP** page. This page will remind you to tell the Recipient to schedule their second dose appointment. You can click **FINISH APPOINTMENT** to close the appointment and bring up the **HOME PAGE**.

*If the Recipient used the CVMS Scheduling feature to book their first appointment, you will see a button labeled **BOOK SECOND DOSE** on this page. See the **SCHEDULE A SECOND DOSE APPOINTMENT** section for more details on that process.*

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Second Dose Appointment

Schedule second dose appointment for confirmation number: r5r9naxiek.

Book Second Dose

Medical History

Wonder Woman
DOB: May 5, 1940
Age: 80

Gender

Other

Race

Other

Ethnicity

Unknown

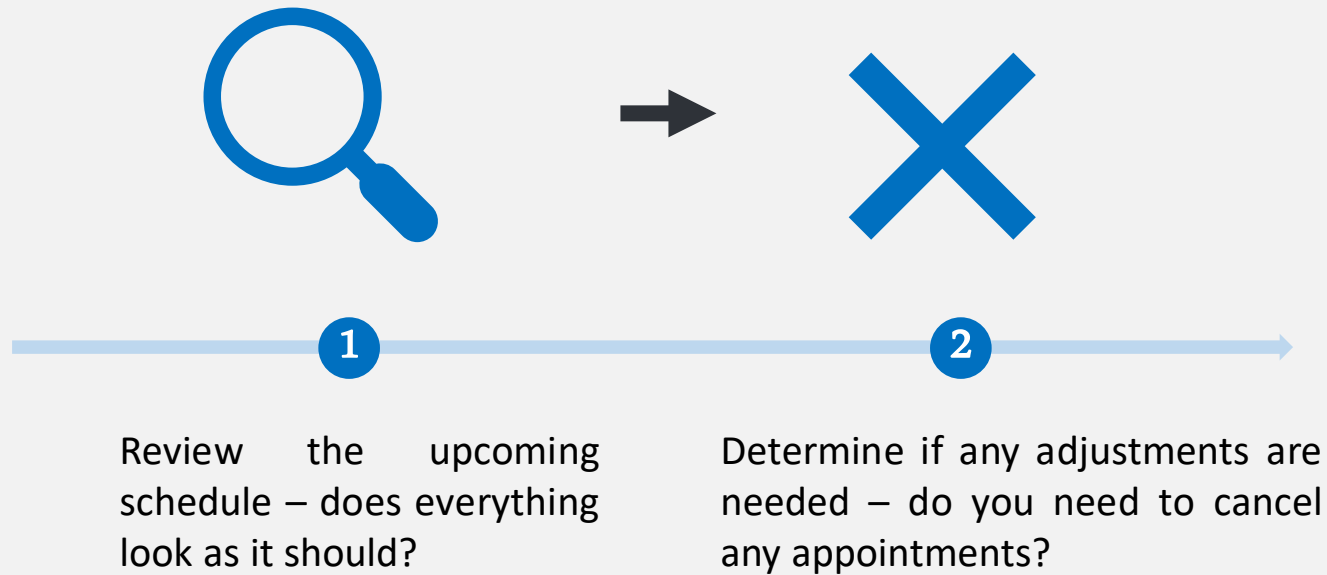
Instructions for Locations that enabled the Scheduling feature in CVMS

For information on how to activate the scheduling feature in CVMS, please refer to the user guide **“Managing Vaccine Site Locator and Appointment Scheduling User Guide”**

Search Scheduled Appointments

Manage Appointments Scheduled by Recipients


As Health Providers, you will want to manage appointments scheduled by Recipients (or on behalf of them). This will involve active review and management of your weekly and daily schedule to determine if updates are needed.



Step 1 of 5: Navigate to Appointments Tab

If the scheduling feature was enabled at your location and you wish to verify how many appointments were schedule, you can search upcoming appointments.

- 1. To begin, navigate to the **APPOINTMENTS** tab.



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 2 of 5: Review and Plan Appointments for the Day

- 1. Enter today's dates in the 2 fields **FROM** and **TO**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

9 Items

Search Appointments

Search Confirmation Number

From

2021-03-10

To

2021-03-10

Status

--- None ---

Search

Reset

<input type="checkbox"/>	Case	Confirmation N...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113945	r137tzquwk.1	Mar 9, 2021	6:39:41 AM	test test	1999-09-09	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113949	n5k31u3179.1	Mar 9, 2021	7:03:00 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113952	n5k31u3179.2	Mar 9, 2021	7:49:50 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 2 Administered	Closed
<input type="checkbox"/>	03113943	fp316c8jc3.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Canceled	Canceled
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	N W W	1980-01-01	County General Hos...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113960	drch74hii6.1	Mar 9, 2021	9:17:35 AM	sked2 testuser	1999-12-19	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Flowers	1991-03-10	County General Hos...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113797	391nxsq8t.1	Mar 9, 2021	6:30:55 PM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New

Previous

Page 1 out of 1

Next

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

The number of appointments will show at the top right of the view.

Step 3 of 5: Search by Name, Location, or Vaccine Status

1. In the **SEARCH APPOINTMENT** field, you can search by name
2. If multiple locations are available, you can also enter the location name
3. Type the status name to search specific **VACCINE STATUS** (Dose 1 Scheduled, Dose 1 Administered, Dose 2 Scheduled, Dose 2 Administered)
4. Click **RESET** to restore the standard view

The screenshot displays the NCDHHS CVMS Provider Portal interface. At the top, the header includes the NCDHHS logo and the text 'CVMS Provider Portal'. Below the header is a navigation bar with links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and More. The main content area shows the user is logged in as 'County General Hospital - Chicago ER'. The 'Appointments' section is active, displaying 'All Appointments' with a 'Cancel Appointment' button. A search bar is present with the text 'Search Appointments' and a dropdown menu showing 'Dose 1 Scheduled'. Below the search bar is a table of appointments. The table has columns: Case, Confirmation N..., Date, Time, Recipient Name, DOB, Location, Vaccine Status, and Status. Four items are listed, all with a status of 'New'. The table is highlighted with a red border. At the bottom of the table, there are navigation buttons: 'Previous', 'Page 1 out of 1', and 'Next'.

Case	Confirmation N...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New
03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	NWW	1980-01-01	County General Hos...	Dose 1 Scheduled	New
03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Flowers	1991-03-10	County General Hos...	Dose 1 Scheduled	New
03113797	391nxsq8t.1	Mar 9, 2021	6:30:55 PM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Step 4 of 5: Search by Using Recipient's Confirmation Number

The **Recipient** received a confirmation code for their appointment. You can also search for a specific recipient's appointment using that confirmation code.

- 1. Enter the confirmation code in the field labeled **SEARCH CONFIRMATION NUMBER**
- 2. Click Search.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

1 items

Search Appointments

Search by Name, Location, Vaccine Status

Search Confirmation Number

gcdspjfp9n.1

From

2021-03-09

To

2021-03-09

Status

--- None ---

Search

Reset

<input type="checkbox"/>	Case	Confirmation N...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New

Previous

Page 1 out of 1

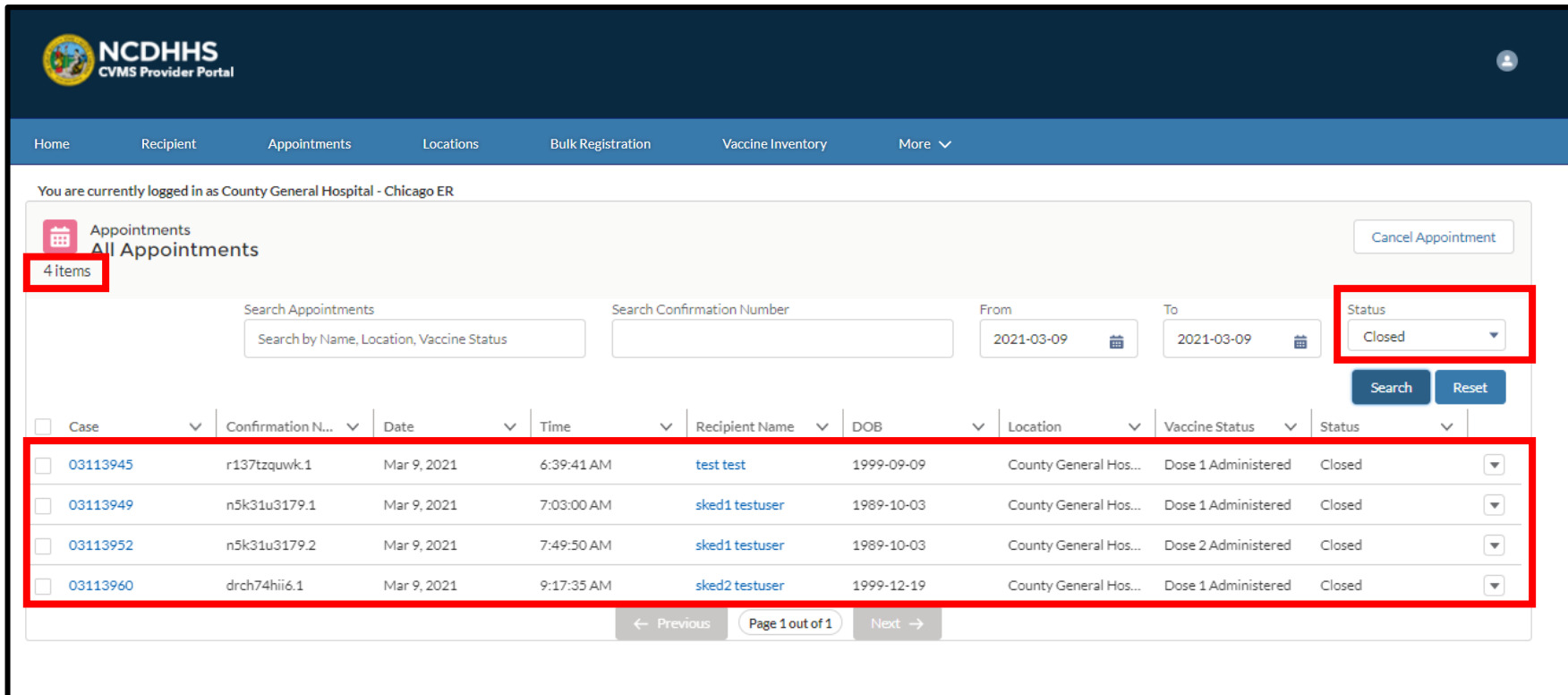
Next

Step 5 of 5: Search by Appointment Status

Another helpful view is Appointment Status over to the right. Options include:

- New –recipients with an upcoming appointments
- Closed – scheduled recipients that had their appointment
- Canceled – appointment canceled either by the recipient or by the provider

1. Select a **STATUS**
2. Click Search.



NCDHHS CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory More ▾

You are currently logged in as County General Hospital - Chicago ER

Appointments
All Appointments 4 items

Search Appointments Search Confirmation Number From To Status

Search by Name, Location, Vaccine Status 2021-03-09 2021-03-09 Closed

Search Reset

<input type="checkbox"/>	Case	Confirmation N...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113945	r137tzquwk.1	Mar 9, 2021	6:39:41 AM	test test	1999-09-09	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113949	n5k31u3179.1	Mar 9, 2021	7:03:00 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 1 Administered	Closed
<input type="checkbox"/>	03113952	n5k31u3179.2	Mar 9, 2021	7:49:50 AM	sked1 testuser	1989-10-03	County General Hos...	Dose 2 Administered	Closed
<input type="checkbox"/>	03113960	drch74hii6.1	Mar 9, 2021	9:17:35 AM	sked2 testuser	1999-12-19	County General Hos...	Dose 1 Administered	Closed

← Previous Page 1 out of 1 Next →

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

Search using the NEW filter to quickly see which appointments were booked overnight.


Recipients can cancel their appointment directly in the scheduling feature through a link included in the confirmation email or the text message.

Cancel first-dose Appointments

Step 1 of 5: Navigate to Appointments Tab

If a scheduled first-dose appointment needs to be cancelled, you can cancel it and notify the recipient of the reason for cancellation. If it's a second-dose appointment (scheduled by the provider), you will need to follow a different process.

- 1. To begin, navigate to the **APPOINTMENTS** tab



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Step 2 of 5: Search for the Recipient by Name, Appointment Date, Confirmation Code, and/or Vaccine Status

- 1. Search for the appointment(s) you need to cancel

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

4 items

Search Appointments

Dose 1 Scheduled

Search Confirmation Number

From

2021-03-09

To

2021-03-09

Status

--- None ---

Search

Reset

Cancel Appointment

<input type="checkbox"/>	Case	Confirmation No.	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status	
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New	
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	NWW	1980-01-01	County General Hos...	Dose 1 Scheduled	New	
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Flowers	1991-03-10	County General Hos...	Dose 1 Scheduled	New	
<input type="checkbox"/>	03113797	391nxsq8t.1	Mar 9, 2021	6:30:55 PM	Wonder Woman	1940-05-05	County General Hos...	Dose 1 Scheduled	New	

← Previous

Page 1 out of 1

Next →

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 3 of 5: Cancel Up to 20 New Appointments

You can cancel up to 20 appointments at a time.

- 1. Click the checkbox at left of the appointments you wish to cancel (up to 20)
- 2. Click the **CANCEL APPOINTMENT** button in the upper right.

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

16 items

Cancel Appointment

Search Appointments

Search Confirmation Number

From

To

Status

Search

Reset

<input type="checkbox"/>	Case	Confirmation Nu...	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113985	duw96des6m.1	Mar 11, 2021	8:00:00 AM	Kermit the Frog	1975-08-08	County General Hosp...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113961	8pi5r8ja5i.1	Mar 11, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hosp...	Dose 1 Scheduled	New
<input checked="" type="checkbox"/>	03113965	fdj1fefdwu.1	Mar 11, 2021	9:00:00 AM	Wonder Woman	1940-05-05	County General Hosp...	Dose 1 Scheduled	New
<input checked="" type="checkbox"/>	03113806	r5r9naxiek.1	Mar 12, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hosp...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113922	d7wyrk19dy.1	Mar 12, 2021	9:00:00 AM	Michael McShane	2000-01-01	County General Hosp...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113839	wu58g7aef.1	Mar 12, 2021	11:00:00 AM	Murali Jallu	2015-01-14	County General Hosp...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113964	7xtyb8ndr.1	Mar 12, 2021	3:00:00 PM	DD RR KK	1975-12-08	County General Hosp...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113789	ne5qzm4yf.1	Mar 12, 2021	4:00:00 PM	n w	1980-01-01	County General Hosp...	Dose 1 Scheduled	New

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

The ability to cancel 20 appointments at a time can be particularly helpful if you have a capacity issue and need to quickly cancel some appointments for the day that cannot be reassigned.

Step 4 of 5: Provide Cancellation Reason and Cancel Appointment

If the appointment was made through the scheduling feature *and* the Recipient opted “in” for receiving text and/or email notifications, they will be notified of the cancellation.

- 1. Enter a reason for cancelling the appointment(s)
- 2. Click the **CANCEL APPOINTMENT** button to confirm the cancellation

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

16 items

Case

03113985

03113961

03113965

03113806

03113922

03113839

03113964

03113789

03113756

Cancel Appointments

DATE	TIME	RECIPIENT NAME	DOB	PROVIDER LOCATION	CANCELLATION REASON
Mar 11, 2021	09:00 AM	Wonder Woman	1940-05-05	County General Hospital - Chicago ER	
Mar 12, 2021	08:00 AM	Wonder Woman	1940-05-05	County General Hospital - Chicago ER	

Close Window

Cancel Appointment

Cancel Appointment

Status

--- None ---

Search

Reset

Status

W

W

W

W

W

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

You may still want to follow up with a call just to make sure they saw the notification.
*Also, if they did **not** sign up for the text and/or email notifications, they will not know that the appointment has been cancelled.*

View Appointment / Cancellation History

To view a record of a Recipient’s appointment history, navigate to the Recipient tab, locate the Recipient’s record, and select **RELATED** tab. The Recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Home

Recipient

Appointments

Help & Information

Person Account

Walkin Example

Eligibility Status

Approved

Priority

Phase 1a

Recipient Dose Status

Dose 1 Canceled

DETAILS

RELATED

Appointments (2)

Appointment	Date and Time of Vaccin...	Vaccine Status	Vaccine
00111719		Dose 1 Canceled	
00111716		Registered	

Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Account Name

Clinic ABC Loc 1

Contact Name

Walkin Example

Appointment DateTime

1/13/2021, 3:59 PM

Cancellation Reason

RECIPIENT CANCELLED

Vaccine Status

Dose 1 Canceled

Vaccine

Vaccine Inventory

Injection Site

Check-In Recipients for Vaccine Administration

Method 1 : Begin Vaccine Administration through Today's Appointments

There are three methods to begin the **VACCINE ADMINISTRATION** process.

The Healthcare Provider who will administer the COVID-19 vaccine could select the Recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.


- 1. Click on the **APPOINTMENT HYPERLINK** to begin the Vaccine Administration.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager



Home Recipient Appointments Help & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.


Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Method 2 : Enter the Appointment Confirmation Number

Alternatively, you could begin the **VACCINE ADMINISTRATION PROCESS** by entering the Recipient's **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

- 1. Enter the **APPOINTMENT CONFIRMATION NUMBER** for the Recipient
- 2. Click **GO** to begin the **VACCINE ADMINISTRATION**



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1
Jan 19, 21, 03:55 PM	Test-1.4 Scenario8 Dose 1 Scheduled	00111940	Clinic ABC Loc 1
Jan 19, 21, 04:00 PM	VaccineAdmin Test Dose 1 Scheduled	00112070	Clinic ABC Loc 1

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Method 3 : Check In the Recipient in the Appointment Tab

Lastly, the **VACCINE ADMINISTRATION** process can also begin from the **APPOINTMENTS TAB**.

1. Navigate to the **APPOINTMENTS TAB**
2. Find the **CORRECT APPOINTMENT BOOKING** for the Recipient you'd like to begin the Vaccine Administration for
3. Click the drop-down arrow to the right of their name
4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

NCDHHS
CVMS Provider Portal

Home Recipient **Appointments** Help & Information

You are currently logged in as County General Hospital - Chicago ER

Appointments
All Appointments
20 items

Cancel Appointment

Search Appointments
Search by Name, Location, Vaccine Status

Search Confirmation Number

From 2021-03-09 To Status New

Search Reset

<input type="checkbox"/>	Case	Confirmation...	Date	Time	Recipient Na...	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General H...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	NWW	1980-01-01	County General H...	Dose 1 Scheduled	New
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Fl...	1991-03-10	County General H...	Dose 1 Scheduled	New

Check In
Book Second Dose

Schedule a First Dose Appointment

Step 1 of 3: Click Book Second Dose

As a provider, you can schedule a first dose appointment using the scheduling feature in CVMS. To do so, you will need to register the recipient first, and then schedule the appointment starting from the CVMS Provider Portal.

- 1. To begin, click the **RECIPIENT** tab
- 2. If the recipient is already registered search for the record with the name and/or date of birth

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Step 1 of 3: Open the Recipient Record

1. To begin, click the **RECIPIENT** tab

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Schedule a Second Dose Appointment

Step 1 of 3: Click Book Second Dose

If a **RECIPIENT** used the scheduling feature in CVMS to book their first appointment and received a vaccine product that requires a second dose, the final page of the VACCINE ADMINISTRATION process will display a button labeled **BOOK SECOND DOSE**.

- 1. To begin, click the **BOOK SECOND DOSE** button

✓

✓

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Second Dose Appointment

Schedule second dose appointment for confirmation number: r5r9naxiek.

Book Second Dose

Medical History

Wonder Woman

DOB: May 5, 1940

Age: 80

Gender

Other

Race

Other

Ethnicity

Unknown

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

Healthcare Providers will only see this option for Recipients who booked their first dose appointment through the Scheduling feature in CVMS.

Step 2 of 3: Select a Date and Time

The CVMS Scheduling Feature will appear in a new tab and will default to the same location as the first dose appointment. The time difference will depend on the vaccine administered. For Pfizer, it will start 17 days later. For Moderna, 24 days later. For Janssen, there is no second dose appointment allowed.

- 1. Select a date for the second dose
- 2. Select an available time slot for the second dose

Schedule Dose 2

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

Now that you have received your first dose, please choose a time for your follow up appointment.

2

Appointment 2

Choose a date and time

April 2021

<

>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

9 appointments available

For Sunday April 11, 2021

8:00am

9:00am

10:00am

11:00am

12:00pm

1:00pm

2:00pm

3:00pm

4:00pm

Complete Appointment

< Back

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

You will not be able to schedule an appointment too early. The CVMS Scheduling Feature will show you the correct timeline for the vaccine your recipient received.

Step 3 of 3: Confirm Appointment

1. Click **COMPLETE APPOINTMENT**
2. Review the details of the scheduled appointment
3. The recipient will only receive a reminder notification if they provided an email and/or phone number and agreed to reminders when they scheduled their 1st dose appointment

Schedule Dose 2

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

Now that you have received your first dose, please choose a time for your follow up appointment.

✓ Appointment 2

Thursday April 15 9:00AM, 2021

Complete Appointment

< Back

✓

The Appointment is Scheduled.

Your confirmation code is
r5r9naxiek.
and an email has been sent to
ch***@gmail.com**

Appointment Details

Location
County General Hospital - Chicago ER

Location address
2110 Blue Ridge Rd, Raleigh, North Carolina 27607

Appointment 2: Date and time
Thursday April 15 9:00AM, 2021

Email
ch***@gmail.com**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

To change the location of the second dose appointment, select the **CHANGE** link at the top of the page.

Cancel second-dose Appointments

Step 1 of 3: Navigate to Appointments Tab

If a scheduled second-dose appointment needs to be cancelled, you cannot cancel it by using the **CANCEL APPOINTMENT** button available in the **APPOINTMENTS** tab.

As a temporary solution, you would need to submit a request to support the cancellation to the support team. Please submit the recipient's name, and the confirmation number.


- 1. To retrieve the confirmation number, navigate to the **APPOINTMENTS** tab

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Step 2 of 3: Search for the Recipient by Name, Appointment Date, Confirmation Code, and/or Vaccine Status


1. Search for the appointment(s) you need to cancel
2. Copy the confirmation Number

Audience

Healthcare
Provider


Healthcare
Location Manager

Statewide
Location Manager

 **NCDHHS**
CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory More ▾

You are currently logged in as County General Hospital - Chicago ER

 **Appointments**
All Appointments
4 items

[Cancel Appointment](#)

Search Appointments
Dose 2 scheduled

Search Confirmation Number

From
2021-03-09

To
2021-03-09

Status
--- None ---

Search

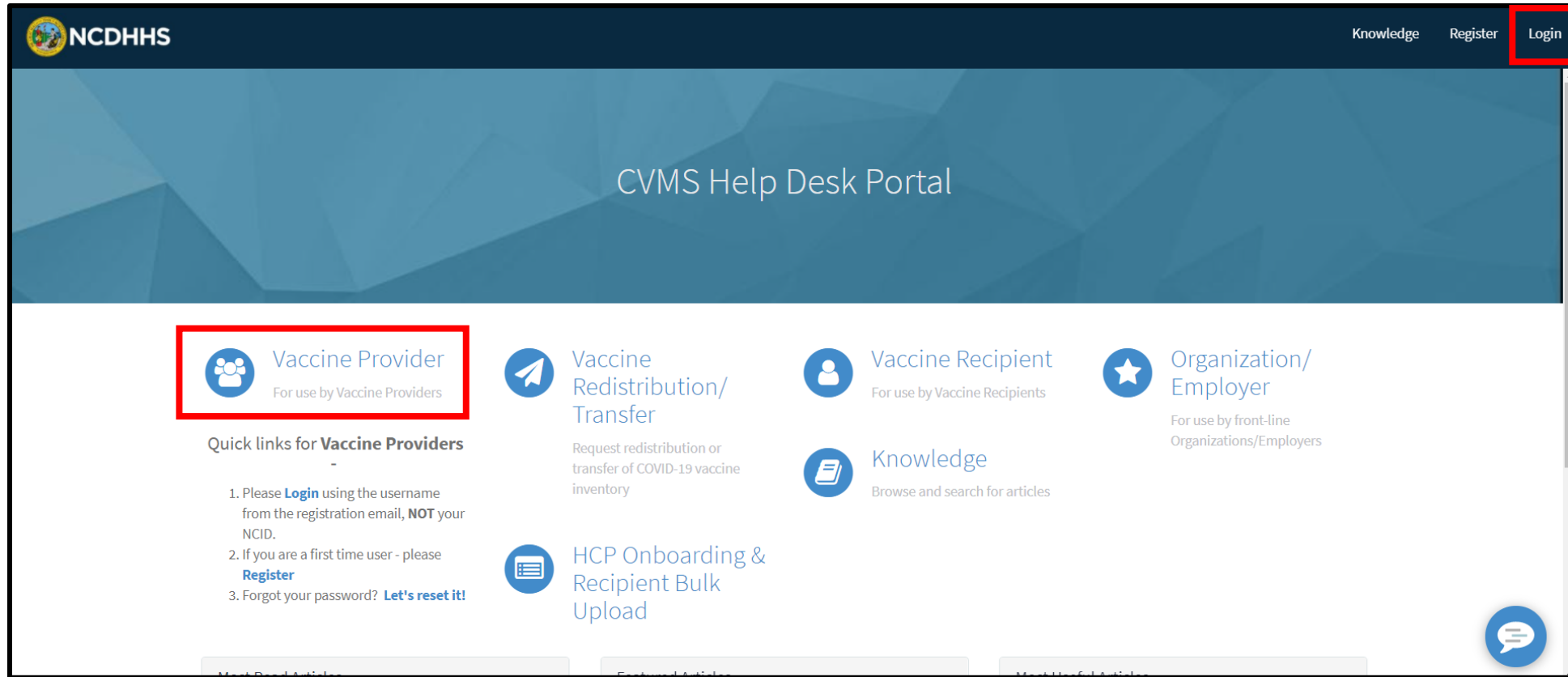
Reset

<input type="checkbox"/>	Case	Confirmation No.	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status	
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General Hos...	Dose 2 scheduled	New	▾
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	NWW	1980-01-01	County General Hos...	Dose 2 scheduled	New	▾
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Flowers	1991-03-10	County General Hos...	Dose 2 scheduled	New	▾
<input type="checkbox"/>	03113797	391nxsq8t.1	Mar 9, 2021	6:30:55 PM	Wonder Woman	1940-05-05	County General Hos...	Dose 2 scheduled	New	▾

← Previous Page 1 out of 1 Next →

Step 3 of 3: Request the Scheduling feature via the CVMS Help Desk Portal

1. **LOG IN** the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine (see page 2 for instructions)
2. Select **VACCINE PROVIDER**
3. Submit a ticket requesting to cancel the appointment



Audience

Healthcare
Location Manager

Statewide
Location Manager


Edit Vaccine Administration Records After Submission

Edit Vaccine Administration Details

Step 1 of 8: Navigate to Appointments Tab

If a **RECIPIENT** has incorrect details entered during Vaccine Administration, the Healthcare Provider **MUST EDIT** the details to ensure data accuracy.

To begin, navigate to the **APPOINTMENTS** tab.



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Healthcare Providers can only update Vaccine Administration details for Recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.

Step 2 of 8: Locate Recipient

Clicking on the Appointments tab takes you to a list view of all Appointments for your location.
Verify that you are currently logged in to the same location that the Recipient received their vaccine.



Home

Recipient

Appointments

Help & Information

Below list shows all Scheduled and Canceled appointments for your location. To cancel an appointment please search in below list, select the appointment, and click the "Cancel Appointment" button

You are currently logged in as Clinic ABC Loc 1

Appointments

All Appointments

11 items

Search Appointments

Search by Name, Location, Vaccine Status

From

To

Status

--- None ---

Search

Reset

Cancel Appointment

<input type="checkbox"/>	Case	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	00112283	Jan 27, 2021	2:21:32 PM	Jay UAT3Phase2Grou...	1955-11-20	Clinic ABC Loc 1	Dose 1 Administered	Closed
<input type="checkbox"/>	00111103	Jan 27, 2021	12:31:12 PM	sahil gupta	1987-07-13	Clinic ABC Loc 1	Dose 1 Administered	Closed
<input type="checkbox"/>	00112274	Jan 27, 2021	11:47:41 AM	Grace Wiy	1990-01-26	Clinic ABC Loc 1	Dose 1 Scheduled	New
<input type="checkbox"/>	00112270	Jan 27, 2021	10:32:04 AM	Test123 Eleven	1953-01-14	Clinic ABC Loc 1	Dose 2 Scheduled	New

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

The **APPOINTMENTS** tab will default to show you appointments that were scheduled for the same day you are logged in.

Step 3 of 8: Select Appointment to be Updated

To begin editing the details of the **VACCINE ADMINISTRATION**, you must first locate the correct **APPOINTMENT RECORD**.

- 1. Enter the name of the Recipient in the Search field, and adjust the date range to capture the date of the appointment that needs updating
- 2. Click **SEARCH**
- 3. Click the **CORRECT APPOINTMENT RECORD** for the Recipient. The correct record will be the one that shows a **VACCINE STATUS** as either **DOSE 1 ADMINISTERED** or **DOSE 2 ADMINISTERED**

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Alternatively, you may search for the Recipient via the **RECIPIENT TAB**, locate their Recipient record, and click on their Appointment record.

Home

Recipient

Appointments

Help & Information

Below list shows all Scheduled and Canceled appointments for your location. To cancel an appointment please search in below list, select the appointment, and click the "Cancel Appointment" button

You are currently logged in as Clinic ABC Loc 1

Appointments

All Appointments

2 items

Search Appointments

VaccineAdmin Test

From

2021-01-10

To

2021-01-20

Status

--- None ---

Search

Reset

Cancel Appointment

<input type="checkbox"/>	Case	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	00111703	Jan 13, 2021	2:18:25 PM	VaccineAdmin Test	1933-12-12	Clinic ABC Loc 1	Dose 1 Administered	Closed
<input type="checkbox"/>	00112070	Jan 19, 2021	4:00:27 PM	VaccineAdmin Test	1933-12-12	Clinic ABC Loc 1	Dose 2 Canceled	Canceled


Step 4 of 8: Review Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will display for the Recipient.

1. All Vaccination details are visible including:

- Date and Time
- Vaccine Product / Inventory
- Injection Site
- Route
- Administered By
- On Behalf of (Clinician)
- Notes

2. To begin editing the details of the **VACCINE ADMINISTRATION**, select any **PENCIL ICON** to the right of a field


NCDHHS
 CVMS Provider Portal

[Home](#)
[Recipient](#)
[Appointments](#)
[Help & Information](#)

[DETAILS](#)
[RELATED](#)

[Change Vaccine Inventory](#)
[Change Recipient](#)

Case Number

00111703

Account Name

[Clinic ABC Loc 1](#)

Contact Name

[VaccineAdmin Test](#)

Appointment Date/Time

1/13/2021, 2:18 PM

Cancellation Reason

Date and Time of Vaccination

1/13/2021, 2:18 PM

Adverse Reaction Consent

☒

Schedule Dose2 Followup Email

☐

Additional Information

Status

Closed

Date/Time Opened

1/13/2021, 2:05 PM

System Information

Created By

[Steve DiGangi](#) , 1/13/2021, 2:05 PM

Vaccine Status

Dose 1 Administered

Vaccine

[Pfizer-BioNTech \(195 MDV\) COVID-19 Vaccine](#)

Vaccine Inventory

[Expiration 1/13/2021 8:30](#)

Injection Site

Left Deltoid

Route

Intramuscular (IM)

Administered By

[Steve DiGangi](#)

On Behalf of (Clinician)

Case Owner

[User16073838354179855083](#)

Notes

No notes to report.

Date/Time Closed

1/13/2021, 2:20 PM

Last Modified By

[Steve DiGangi](#) , 1/13/2021, 2:20 PM

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

Step 5 of 8: Edit Vaccine Administration Details

Case Number
00111703

Account Name
Clinic ABC Loc 1

Contact Name
VaccineAdmin Test

Appointment DateTime
Date: 1/13/2021 Time: 2:18 PM

Cancellation Reason
--None--

Date and Time of Vaccination
Date: 1/13/2021 Time: 2:18 PM

Adverse Reaction Consent
☒

Schedule Dose2 Followup Email
☐

Additional Information
* Status
Closed

System Information
Created By
Steve DiGangi, 1/13/2021, 2:05 PM

Vaccine Status
Dose 1 Administered

Vaccine
Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

Vaccine Inventory
Expiration 1/13/2021 8:30

Injection Site
Left Lower Forearm

Route
Subcutaneous (SQ)

Administered By
Search Contacts...

On Behalf of (Clinician)
Simon Couderc

Case Owner
User16073838354179855083

Notes
No notes to report.

Date/Time Opened
1/13/2021, 2:05 PM

Date/Time Closed
1/13/2021, 2:20 PM

Last Modified By
Steve DiGangi, 1/13/2021, 2:20 PM

Cancel Save

The **VACCINE ADMINISTRATION** details will now appear as editable fields. As you edit fields, they will highlight yellow to indicate that you've made a change.

1. Edit any of the following fields to the correct information:

- Date / Time of Vaccination
- Injection Site
- Route
- Administered By
- On Behalf of (Clinician)
- Notes

2. Do not edit any of the following fields:

- Account Name
- Cancellation Reason
- Appointment Date / Time
- Case Owner

3. Click **SAVE**

Audience

Healthcare
Provider

Healthcare
Location Manager


Statewide
Location Manager

Tips

From this screen, you cannot edit the **VACCINE INVENTORY**. To see how to edit Vaccine Inventory, look at the next slide.

Step 6 of 8: Change Vaccine Inventory

To edit the **VACCINE INVENTORY** field of the **VACCINE ADMINISTRATION**, you must select the **CHANGE VACCINE INVENTORY** button.



Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Case Number

00111703

Account Name

Clinic ABC Loc 1

Contact Name

VaccineAdmin Test

Appointment DateTime

1/13/2021, 2:18 PM

Cancellation Reason

Date and Time of Vaccination

1/13/2021, 2:18 PM

Vaccine Status

Dose 1 Administered

Vaccine

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

Vaccine Inventory

Expiration 1/13/2021 8:30

Injection Site

Left Deltoid

Route

Intramuscular (IM)

Administered By

Steve DiGangi

Change Vaccine Inventory

Change Recipient

Audience

Healthcare Provider

Healthcare Location Manager

Tips

Review the next section of this User Guide for instructions on how to use the **CHANGE RECIPIENT** button.

Step 7 of 8: Select an Updated Vaccine Inventory

A pop-up window will appear inviting you to Change Vaccine Inventory.

- 1. Click the **SEARCH VACCINE INVENTORIES** field, which will populate a list of available inventories for your location
 - 2. Locate and click the correct inventory, or type the name of the inventory to quickly find it
- Note:** You can not change the Vaccine Inventory from a two-dose vaccine product to a single-dose vaccine product if you are editing a **SECOND DOSE** vaccine administration

3. Click **FINISH**

Change Vaccine Inventory

Existing Vaccine Inventory:
Expiration 1/13/2021 8:30

Updated Vaccine Inventory Name:

Search Vaccine Inventories...

Case Number:
00111703

Account Name:
Clinic ABC Loc 1

Contact Name:
VaccineAdmin Test

Appointment Date/Time:
Jan 13, 2021, 2:18:25 PM

Cancel

Finish

Updated Vaccine Inventory Name:

Search Vaccine Inventories...

SomTestInventoryUAT3

Grace Pfizer Inventory

Expiration 1/13/2021 8:30

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Although **VACCINE PRODUCT** is not an editable field, changing the **VACCINE INVENTORY** to an inventory of a different product will automatically update the **VACCINE PRODUCT** field.

Step 8 of 8: Review the Vaccine Administration Details Change History

[Home](#)[Recipient](#)[Appointments](#)[Help & Information](#)

DETAILS

RELATED

Related Cases (0)

[New](#)

Case History (6+)

Date	Field	User	Original Value	New Value
1/28/2021, 9:52 ...	Vaccine Inventory	Steve DiGangi	Grace Pfizer Invent...	Expiration 1/13/20... <div>▼</div>
1/28/2021, 9:52 ...	Vaccine Inventory	Steve DiGangi	Expiration 1/13/20...	Grace Pfizer Invent... <div>▼</div>
1/27/2021, 3:28 ...	Administered By	Steve DiGangi	Steve DiGangi	<div>▼</div>
1/27/2021, 3:28 ...	Route	Steve DiGangi	Intramuscular (IM)	Subcutaneous (SQ) <div>▼</div>
1/13/2021, 2:20 ...	Vaccine Inventory	Steve DiGangi		Expiration 1/13/20... <div>▼</div>
1/13/2021, 2:20 ...	Status	Steve DiGangi	New	Closed <div>▼</div>

[View All](#)

At any point, you can review the history of changes made to the Vaccine Administration details.

- 1. From the Appointment Record, click the **RELATED** tab
- 2. View **CASE HISTORY** to see the date, time, user, old value, and new value for each individual field that was changed

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Edit Vaccine Administration Recipient

Step 1 of 5: Navigate to Recipient Tab

When a **HEALTHCARE PROVIDER** enters Vaccine Administration details for the wrong **RECIPIENT**, the Healthcare Provider must change the recipient for the entered Vaccine Administration details.

To begin, navigate to the **RECIPIENT** tab.



Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Full name (required), ex: John Smith

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Status	Priority	Recipient Dose Status	Email
------------	-----------	---------------	--------	--------------------	----------	-----------------------	-------

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
------------	-----------	---------------	--------	-------------

No results, please search again.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Healthcare Providers can only change Vaccine Administration Recipient for Recipients who received their vaccine through the same location as the Healthcare Provider.

Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT TAB** takes you to a screen to search all Recipients in CVMS.


- 1. Type in the incorrect recipient's name in the search box
- 2. Click **SEARCH**
- 3. Select the recipient's name

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.


Q Jane WrongName

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Status	Priority	Recipient Dose Status	Email
Jane	WrongName	Dec 2, 1944	Female	Approved	Group 2	Dose 1 Administered	



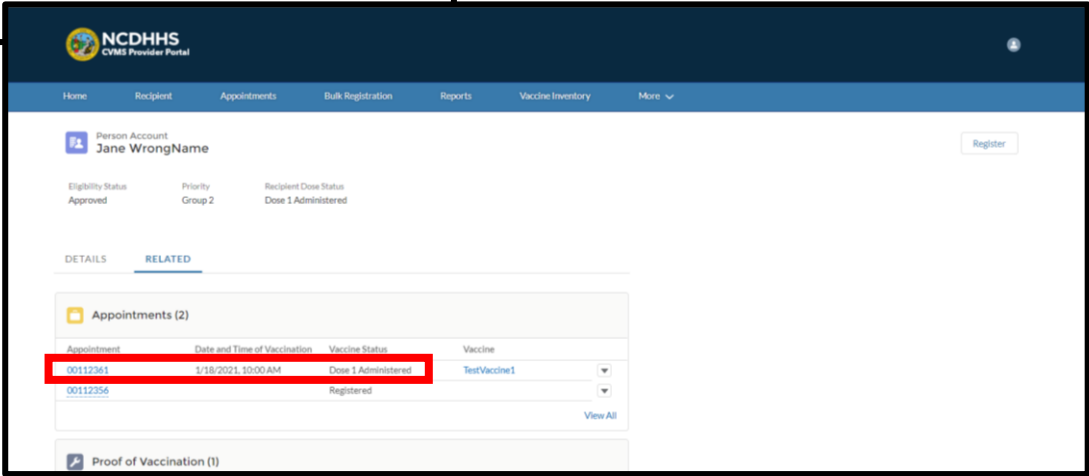
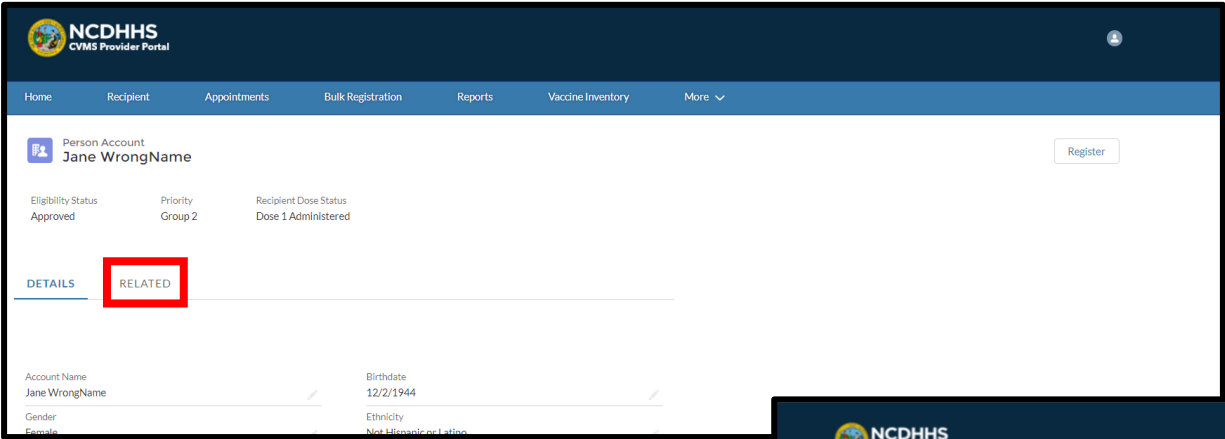
NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

- 1. Click on the **RELATED** tab under the recipient's name to view appointment information
- 2. Select the appointment record that needs to be changed to another recipient (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED** or **DOSE 2 ADMINISTERED**)



Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Step 4 of 5: Change Recipient

Selecting the appointment record takes you to the appointment details screen.

Click **CHANGE RECIPIENT** in the top right corner to transfer the **VACCINE ADMINISTRATION** details to the correct recipient.

HomeRecipientAppointmentsBulk RegistrationReportsVaccine InventoryMore

DETAILSRELATED

Case Number00112361

Account NameClinic ABC Loc 1

Contact NameJane WrongName

Appointment DateTime1/18/2021, 10:00 AM

Cancellation Reason

Date and Time of Vaccination1/18/2021, 10:00 AM

Adverse Reaction Consent

Schedule Dose2 Followup Email

Vaccine StatusDose 1 Administered

VaccineTestVaccine1

Vaccine InventorySomTestInventoryUAT3

Vaccine DosageFirst Dose

Injection SiteLeft Deltoid

RouteIntramuscular (IM)

Administered ByKaitlin Gates

On Behalf of (Clinician)Steve DiGangi

Case OwnerUser16073838354179855083

Additional Information

Status

Notes

Change Vaccine Inventory

Change Recipient

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 5 of 5: Locate Correct Recipient

A Change Recipient pop-up box will appear.

- 1. Search for the correct recipient in the **UPDATED CONTACT NAME** field
- 2. Click **FINISH**
- 3. A Success Confirmation pop-up should appear at the top of the screen
- 4. 3. A Success confirmation pop-up should appear at the top of the screen

Change Recipient

Existing Contact Name:
Jane WrongName

Updated Contact Name:

Jane RightName

×

Case Number :
00112361

Account Name:
Clinic ABC Loc 1

Vaccine Status:
Dose 1 Administered

Appointment Date/Time:
Jan 18, 2021, 10:00:00 AM

Cancel

Finish

NCDHHS
CVMS Provider Portal

Success!
Recipient Updated Successfully!

Home Recipient Appointments Bulk Registration Reports Vaccine Inventory More

DETAILS RELATED

Change Vaccine Inventory

Change Recipient

Case Number
00112361

Account Name
Clinic ABC Loc 1

Contact Name
Jane RightName

Appointment Date/Time
1/18/2021, 10:00 AM

Cancellation Reason

Date and Time of Vaccination

Vaccine Status
Dose 1 Administered

Vaccine
TestVaccine1

Vaccine Inventory
SomTestInventoryUAT3

Vaccine Dosage
First Dose

Injection Site
Left Deltoid

Route

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

The status of the incorrect Recipient will be reverted to their previous status, (e.g., ‘Dose 1 Administered’ will revert to ‘Registered’).

The correct Recipient’s status will be updated to reflect the administered vaccine (e.g., updated from ‘Registered’ to ‘Dose 1 Administered’).

Post-Vaccine Administration Reminders

Post Vaccine Administration Reminders

After recipients received a first dose, they will receive **TWO (2) SECOND DOSAGE REMINDER NOTIFICATIONS** of the timing requirements for the second dosage:

1. The first reminder is **24 HOURS** after
2. The second is **ONE WEEK AFTER** the first dosage is administered.

They also will receive a **NOTIFICATION** informing you of your **PROOF OF VACCINATION**. This will be automatically generated for them.

NOTE: COVID-19 vaccination record cards should be provided to the Recipient or their guardian after the Recipient receives their COVID-19 vaccine.

The Recipient can request you provide a completed vaccination record card with important information about the COVID-19 vaccine they received (i.e., vaccine manufacturer, lot number, date of first dose administration, and second dose due date).

You can also suggest that they take a picture of their vaccination record so they can remember the type of vaccine they received and their second dose due date.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

Learn more about viewing a Recipient's Proof of Vaccination in the **CVMS Provider Portal Viewing Proof of Vaccination User Guide**.

Recipients who receive a **SINGLE-DOSE** product will not receive any second-dose notifications.

Appendix

When the Recipient is NOT in an active Vaccine Group

When you verify **RECIPIENT’S VACCINE GROUP**, and the Recipient is **NOT** in an active Vaccine Group, you are still able to **CREATE THE APPOINTMENT BOOKING** and **ADMINISTER THE COVID-19 VACCINE**.

***Option #1:** If the Recipient informs you that their health information is **NOT CORRECT**, ask the Recipient to **UPDATE** the COVID-19 Vaccine Registration form in the **COVID-19 VACCINE PORTAL** for recipients or you can update the Recipient’s registration information on their behalf.*

***Option #2:** You can administer the vaccine at your discretion, regardless of the Vaccine Group listed in CVMS.*

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager






Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group :	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Registered

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not compatible with CVMS.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/18/2020	<ul style="list-style-type: none"> • Added Patient Verification and Screening page, Removed mention of Adverse Reaction Annotation, clarified On Behalf Of (Clinician), added Schedule Follow-up Page • Updated Process for Recipients that are not Eligible yet / Not Approved 	9-18, 22	Steve DiGangi
2	1/10/2021	<ul style="list-style-type: none"> • Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Help Desk Portal information 	1, 2, 22	Courtney Seward
3	1/13/2021	<ul style="list-style-type: none"> • Updated screenshots to include updated branding, Appointments tab, Second Dose warning label, and new Vaccine Route • Included information about Recipients who may receive a first dose outside of CVMS 	5, 9-11, 13-17, 21	Steve DiGangi
4	1/28/2021	<ul style="list-style-type: none"> • Added Location Switcher button explanation section • Added new section: Edit Vaccine Administration Details After Submission • Added new section: Edit Vaccine Administration Recipient 	8-12, 23-31, 32-37	Steve DiGangi Kaitlin Gates
5	3/1/2021	<ul style="list-style-type: none"> • Added information about single-dose products 	21, 22, 30, 39	Steve DiGangi
6	3/4/2021	<ul style="list-style-type: none"> • Updated information regarding COVID-19 Vaccine Portal • Removed eligibility branding to replace with Vaccine Group 	14, 41	Steve DiGangi
7	3/10/2021	<ul style="list-style-type: none"> • Updated branding to include Recipient Check-In Tool • Added Appointment Confirmation Number usage • Added Book Second Dose Appointment section • Created new section to cover scheduled appointments 	5, 6, 9, 10, 12, 14-17, 24-45	Steve DiGangi